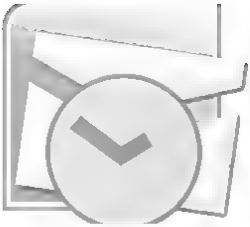

CHAPTER 13

Microsoft Outlook Basics

13. Microsoft Outlook Basics

13.1 MS Outlook 2010 – Overview & User Interface

Microsoft Outlook is a personal information manager from Microsoft, available as a part of the Microsoft Office suite. Although often used mainly as an email application, it also includes a calendar, task manager, contact manager, note taking, journal, and web browsing.

From a redesigned look to advanced e-mail organization, search, communication and social networking features, Outlook 2010 provides you with a world-class experience to stay productive and in touch with your personal and business networks.

13.1.1 User Interface

Figure 13.1 – Expanded Ribbon

In Outlook 2010, the ribbon has replaced the former menus in the main Outlook window. A typical ribbon depiction is given below.

Many Outlook settings that are not directly related to creating or managing Outlook items, such as print commands and account management options, are now shifted to **Microsoft Office Backstage view**.

Figure 13.2 – Ribbon Overview

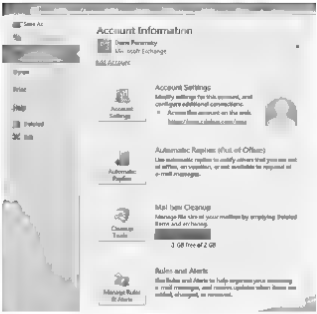

Figure 13.3 Backstage View

An improved conversation view is now available when you work with your messages. This view improves tracking and managing related messages regardless of the folder that contains the messages. You can see the complete course of the conversation including your responses, find the most recent responses and more easily determine the message most important to you. You can also easily categorize or ignore a complete conversation.

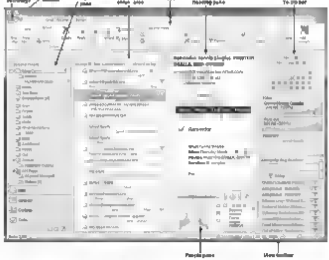

Figure 13.4 – Overall Layout of MS Outlook

The Ignore button

The Ignore button added to Outlook is just what those of us who belong to lots of email discussion lists have been waiting for. It allows you to get rid of conversation threads that you aren't interested in. Not only will it delete all messages in your Inbox that belong to the thread but it will automatically delete any messages pertaining to that thread that come in later.

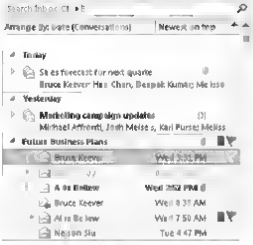

Figure 13.5—Conversation View

Figure 13.6—The Ignore Button

Clean up conversation

Outlook 2010 also makes it easier to manage conversations. When you view messages in Conversation View, you can right-click a conversation title and select from a number of actions that you can perform. If you select Clean Up Conversation, redundant messages in the conversation will be deleted.

Figure 13.7—Clean Up Conversation

Quick Steps

Another great new Outlook feature is Quick Steps. This is a section on the Ribbon's Home tab where you can create single-click links to perform tasks that normally require multiple steps.

Figure 13.8—Quick Steps

Instant Search Improvements

Figure 13.9—Search Tools

In Outlook 2010 it is easier to narrow your search results by using criteria such as sender, subject keywords and other information such as the presence of attachments. The Search Tools contextual tab includes a set of filters that efficiently focus your search to isolate the items that you want.

USEFUL TIP

MS Outlook 2010 is mostly used by business office users as it offers full compatibility with MS Office applications and syncs well with Windows operating systems.

QUICK REVIEW

- What is the most important use of MS Outlook 2010?
- How will you access Backstage View in MS Outlook 2010?
- Most important User Interface feature of MS Outlook 2010?

13.2 Mail

13.2.1 Add/Configure an e-mail Account

Before you can send and receive e-mail messages using Outlook 2010, you must add and configure an e-mail account. If you have used an earlier version of Microsoft Outlook on the same computer where you have installed Outlook 2010, your account settings are automatically imported.

About email accounts

Outlook supports Microsoft Exchange, POP3 and IMAP accounts. Your Internet service provider (ISP) or email administrator can give you the configuration information that you must have to set

up your email account in Outlook

Email accounts are contained in a profile. A profile is made up of accounts, data files and settings that specify where your email messages are saved. A new profile is created automatically when you run Outlook for the first time.

13.2.1.1 Add an email account when you first start Outlook 2010

If you are new to Outlook or are installing Outlook 2010 on a new computer, the Auto Account Setup feature automatically starts and helps you configure account settings for your email accounts. This setup requires only your name, email address and password. If your email account can't be automatically configured, you must enter the required additional information manually.

Figure 13.10—Outlook Start Up

Start Outlook. When prompted to configure an email account, click Next.

To add an email account, click Yes and then click Next. Enter your Name, email address and Password and then click Next.

A progress indicator appears as your account is configured. The setup process can take several minutes.

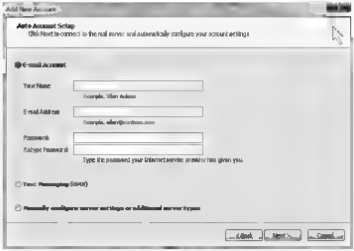

Figure 13.11—Account Setup

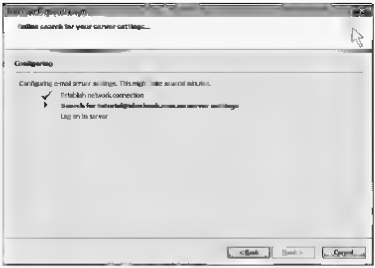

Figure 13.12 – Account Setup

After the account is successfully added, you can add more accounts by clicking **Add another account**

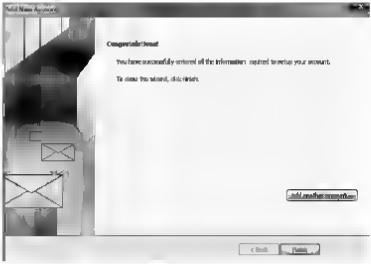

Figure 13.13 – Account Setup Complete

To exit the Add New Account dialog box, click Finish

13.2.1.2 To add a personal Gmail account in addition to main account

Here's how you can easily add your Gmail account using POP (Post Office Protocol) to Outlook 2010

First Step

Log into your Gmail account and go to your settings page. Under the Forwarding and POP/IMAP tab make sure POP is enabled. You can choose to enable POP access for all new mail that arrives from now on, or for all mail in your Gmail account. On the second option we suggest you chose keep Gmail's copy in the Inbox so you can still access your emails on the Gmail server.

Second Step

In Outlook, under Add Account section, manually enter (choose manual configuration) your username, email address and login information. Under Server information enter in the following:

- ✓ Account Type: POP3
- ✓ Incoming mail server: pop.gmail.com
- ✓ Outgoing mail server: smtp.gmail.com

Make sure to check Remember password so you don't have to enter it every time.

Third Step

- ✓ After that data is entered in, click on the More Settings button.
- ✓ Select the Outgoing Server tab and check My outgoing server (SMTP) requires authentication. Verify Use same settings as my incoming mail server is marked as well.

Fourth Step

Next select the Advanced tab and enter the following information:

- ✓ Incoming Server (POP3): 995
- ✓ Outgoing server (SMTP): 587
- ✓ Check This server requires an encrypted connection (SSL)
- ✓ Set Use the following type of encrypted connection to: TLS

Fifth Step

- ✓ Click OK to close the window, and then click Next to finish setting up the account. Outlook will test your account settings to make sure everything will work, click Close when this is finished.

✓ Gmail will be all ready to sync with Outlook 2010 Enjoy your Gmail account in Outlook, complete with fast indexed searching, conversation view and more

13.2.2 Composing & Sending Mail

Outlook 2010 enables you to communicate with one or more recipients with a rich set of features and customizations. In Mail on the Home tab in the New group click New E-mail

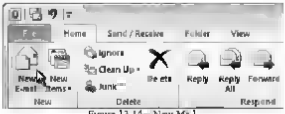

Figure 13 14—New Mail

- Keyboard shortcut - To create an e mail message press CTRL+SHIFT+M
- In the Subject box type the subject of the message
- Enter the recipients email addresses or names in the **To Cc** or **Bcc** box Separate multiple recipients with a semicolon
- To select recipients names from a list in the Address Book, click **To Cc**, or **Bcc** and then click the names that you want
- After you have composed the message click **Send**

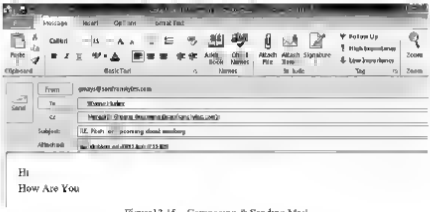

Figure13 15 – Composing & Sending Mail

13.2.3 Reply or forward an email message

When you reply to an email message the sender of the original message is automatically added in the **To** box Similarly when you use **Reply All** a message is created and addressed to the sender and any additional recipients of the original message Whichever you choose, you can change the recipients in the **To Cc** and **Bcc** boxes When you forward a message the **To Cc** and **Bcc** boxes

are empty and you must enter at least one recipient

Reply to the Sender or other Recipients

You can reply to only the sender of a message, or any combination of people who appear on the To and Cc lines. You can also add new recipients. On the Home or Message tab in the Respond group, click **Reply**, **Reply All**, or **Forward**.

Figure 13.16 – Reply Mail

To remove a name from the **To** and **Cc** lines, click the name and then press DELETE. To add a recipient, click in the To, Cc or Bcc box and enter the recipient. Compose your message & Click Send.

- **Cc** is shorthand for Carbon Copy. If you add a recipient to this box in an Outlook email message, a copy of the message is sent to that recipient, and the recipient's name is visible to other recipients of the message.
- **Bcc** is shorthand for Blind Carbon Copy. If you add a recipient to this box in an email message, a copy of the message is sent to that recipient, and the recipient's name isn't visible to other recipients of the message.

USEFUL TIP

Use your discretion when you click **Reply All**, especially when there are distribution lists or many recipients on your reply. It's often better to use **Reply** and then add only necessary recipients, or use **Reply All** but remove unnecessary recipients and distribution lists.

Forward a Message

When you forward a message, the message includes any attachments that were included with the original message.

- On the Home or Message tab in the Respond group, click Forward.
- Enter recipients in the To, Cc, or Bcc boxes.
- Compose your message & Click Send.

USEFUL TIP

If you want to forward two or more messages to the same recipients as one message, in Mail click one of the messages, press CTRL, and then click each additional message. On the Home tab in the Respond group, click Forward. Each message is forwarded as attachments in a new message.

Setting an Automatic Reply

If you won't be able to answer your messages for several days, it's easy to set an automatic reply (also known as a Vacation Reply), which will automatically reply to any messages you receive. A vacation reply typically includes the date you plan to return and contact information while you're unavailable. To begin click the File tab on the Ribbon.

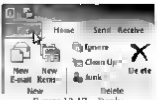

Figure 13.17 – Reply

Backstage view will appear. Locate and select Automatic Replies.

Figure 13.18 – Reply Option

The Automatic Replies dialog box will appear. From here, you can choose several options for your reply, including a time range and rules. Include a message for the reply, and then click OK.

Your reply will be automatically sent to any messages you receive.

Figure 13.19 – Setting Reply

USEFUL TIP

You can add as many personal accounts on your MS Outlook account – advantages if adding other email accounts in Outlook are

a. One Stop Shop access for all your important emails – all under one place – complete offline access of all downloaded emails

b. Full MS Office compatibility – easy to insert tables, draft and update files using MS office applications, full support of Microsoft tools

QUICK REVIEW

- How will you add your Gmail personal account on Outlook 2010?
- How will you set an Automatic Mail Reply on Outlook 2010?

13.3 Calendar – Appointments & Meetings

Outlook 2010 includes powerful scheduling features in Calendar view From there you can create appointments arrange meetings and manage your time Calendar view makes it easy to schedule appointments and keep track of important dates just like a desk calendar But unlike a physical calendar Calendar view allows you to quickly edit and rearrange your schedule whenever you want While most frequently used in the workplace Calendar view can also be helpful for managing a busy personal schedule on your home computer

Figure 13 20—Calendar Access

To access **Calendar view** locate and select the Calendar View tab in the lower-left corner of the screen Calendar view will appear

You can use interface diagram given below to become more familiar with Calendar view

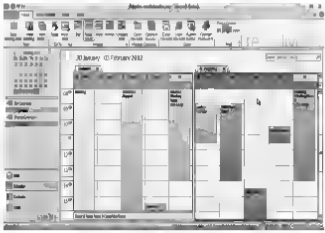

Figure 13 21 —Calendar View

13.3 1 To create an appointment

Locate and select the New Appointment command on the Ribbon

The New Appointment dialog box will appear. Enter the desired information for the appointment. At the very least, you should include a subject, time and location but you can also include lots of other information such as reminder preferences and detailed notes. When you're done entering the appointment information, click **Save & Close**.

Figure 13.22— New Appointment

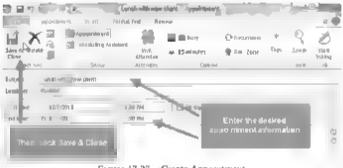

Figure 13.23— Create Appointment

The appointment will be saved and added to your calendar.

Recurring Appointment

If you have a standing appointment—for example, a weekly staff meeting or lunch date every Wednesday—you can create a recurring appointment that will appear on your calendar automatically. Simply click the Recurrence command when scheduling an appointment, and then choose how frequently the appointment should be scheduled.

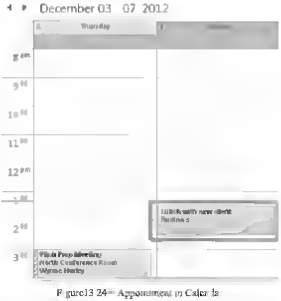

Figure 13.24— Appointment in Calendar

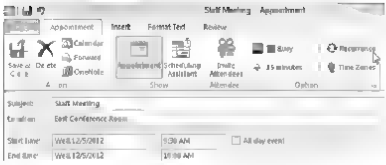

Figure 13.25—Recurring Appointment

Appointment Reminders

You can create reminders for your most important appointments, which can be especially helpful if you keep a busy schedule. For example, you might schedule a reminder for an important lunch date that would appear 30 minutes before the appointment. To create a reminder, simply set a reminder time on the Ribbon when creating a new appointment.

Figure 13.26—Setting Appointment Reminder

The reminder will appear in a pop-up dialog box at the scheduled time.

Figure 13.27—Appointment Reminder

13.3.2 Scheduling Meetings

Once your calendar is shared with other users in your workplace, you can use your shared calendars to schedule meetings.

To Send a Meeting Request

A meeting is just like an appointment on

your calendar, but with other attendees. To schedule a meeting, you must first send a meeting request. Locate and select the New Meeting command on the Ribbon.

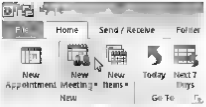

Figure 13.28—New Meeting

The New Meeting dialog box will appear. Whenever you request a meeting, you'll actually be sending an email message to attendees. Enter attendees for the meeting into the **To** field as you would enter recipients in the Compose window of an email.

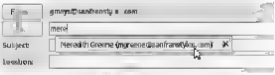

Figure 13.29—Sending Meeting Request

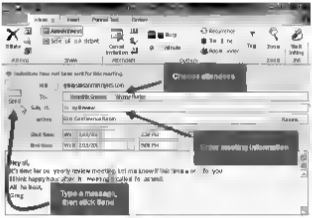

Figure 13.30—Meeting Request

Enter the information for the meeting. At the very least, you should include a subject, time and location. You can also include a message as you would in an email. When you've finished entering meeting information, click **Send**.

The meeting request will be sent to the selected attendees, and the meeting will appear on your calendar. When your attendees accept the meeting request, the meeting will appear on their calendars as well.

Figure 13.31—Meeting Request in Calendar

To Accept a MeetingRequest

When someone wants to schedule a meeting with you, you will receive a meeting request as an email message. You need to navigate to Mail view. Locate and select the meeting request.

Figure 13.32—Select Meeting Request

Click **Accept** at the top of the message and then choose your desired options from the drop-down menu. You can choose to either edit your reply or simply **Accept** the meeting.

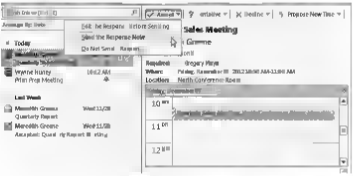

Figure 13.33—Response to Meeting Request

The meeting will be added to your calendar.

To set up a recurring meeting, on the **Meeting** tab in the **Options** group, click **Recurrence**. Choose the options for the recurrence pattern you want, and then click OK. When you add a recurrence pattern to a meeting request, the Meeting tab changes to Recurring Meeting.

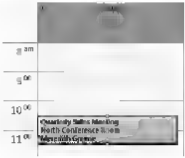

Figure 13.34—Calendar showing Meeting

USEFUL TIP

Outlook also offers efficient Reminders utility. We suggest you also try to learn more about How to set Meeting/Appointment Reminders on MS Outlook 2010.

QUICK REVIEW

- How will you schedule an Appointment in Outlook 2010?
- How will you schedule a Meeting in Outlook 2010?
- How will create a Recurring Appointment in Outlook 2010?

13.4 Contacts, Tasks & Notes

Contacts view is the central place for all your contacts in Outlook 2010. Maintaining a detailed contacts list will make sending emails and scheduling meetings much easier.

13.4.1 The Contacts view interface

To access Contacts view, locate and select the Contacts View tab in the lower left corner of the screen. Contacts view will appear.

Figure 13.35—Contacts View

Adding Contacts

Contacts can be added by one of the following ways:

1. You can manually enter information for each of your contacts.
2. You can import existing lists of contacts from other accounts, such as Gmail. If you already have several contacts saved with another account, this method can save you a lot of time and effort.

To add a new contact manually

From Contacts view, locate and select the New Contact command on the Ribbon.

Figure13.36—New Contact

The Contact dialog box will appear. Enter the contact information. At the very least, you should enter a first and last name as well as an email address. However, you can also enter other information, like phone numbers, alternate email addresses and more. When you are finished filling out the contact information, click Save & Close.

The contact will be added to your contacts list.

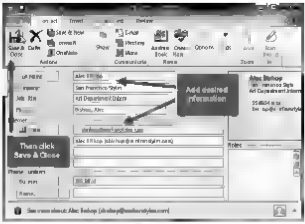

Figure 13.37 – Save New Contact

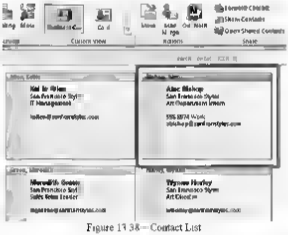

Figure 13.38 – Contact List

To import Contacts

In order to import contacts to Outlook, you must first export those contacts to a file, most commonly a Comma Separated Value file also known as **CSV**. Most email applications will provide instructions on how to export your existing contacts. Once you've exported your contacts, you're ready to import them to Outlook.

- Click the File tab on the Ribbon
- Backstage view will appear. Select Open
- The Open options will appear. Select Import.

Figure 13.39 – Import Contact

The Import and Export Wizard will appear. Follow the instructions to import contacts into Outlook.

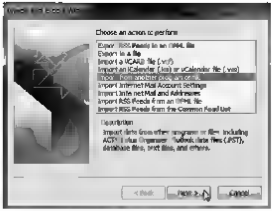

Figure 13 40—Import Wizard

13 4 2 Create Task

In Tasks, on the Home tab in the New group, click New Task

Figure 13 41—New Task

- **Keyboard shortcut** - To create a new **Task**, press CTRL+SHIFT+K
- In the Subject box, type a name for the task. You can add more detail in the task body
- On the Task tab, in the Actions group, click **Save & Close**

A sample To Do list pane is shown below

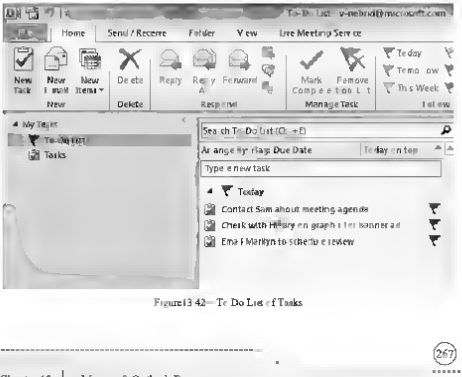

Figure 13 42—To Do List of Tasks

To Assign Tasks

If you want to use Outlook 2010 to manage projects and tasks, you can assign tasks (also known as To-Dos) to your contacts. Your contact will receive a notification about the task, and you'll be notified when the task is completed.

Figure 13.43—Assign Task

Click the desired contact locate and select the More command on the Ribbon, then select Assign Task from the drop-down window

The Task window will appear Enter a subject as you would for an email message as well as a due date for the task When you're finished entering information about the task then click **Send**

Figure 13 44 – Send Task

13.4.3 Create a Note

Notes are the electronic equivalent of paper sticky notes. You can use Notes to jot down questions ideas reminders and anything you would write on a paper You can leave notes open on the screen while you work. This is convenient when you are using notes for saving information that you might need later such as directions or text you want to reuse in other items or documents You can create a note from any Outlook folder

In Notes, on the Home tab in the New group click New Note

Figure 13 45 – New Note

- Keyboard shortcut for creating a Note press CTRL+SHIFT+N
- Type the text of the note The note saves automatically
- To close the note click the note icon image in the upper left corner of the Note window and then click **Close**

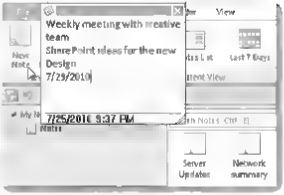

Figure13 46 – Create Note

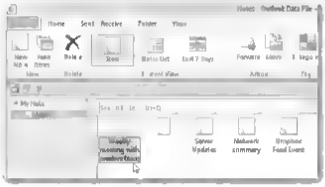

Figure13 47 – Note List

You can leave the note open while you work, and drag it to any location on your screen for easier viewing.

USEFUL TIP

In addition to Tasks & Notes, Outlook also offers Journal utility to track/record various actions Journal automatically records actions that you choose which relate to specific contacts and puts the actions in a Timeline view You can use Journal to track Microsoft Outlook items, such as email messages or meetings It can also track other Microsoft Office files, such as Word documents or Excel workbooks

QUICK REVIEW

- How can you add a Contact in Outlook 2010?
- How to create Task on Outlook 2010?
- How to create a Note on Outlook 2010?

13.5 Exporting & Importing Items – Backup/Restore Process

You can export your email and mail folders calendar appointments, tasks, notes and additional content from Outlook as a **pst** file and import everything in one go onto a different computer or into another mail profile. The **pst** file can be saved to other media as with any form of data, however they can only be opened within Outlook other programs will not be able to open a **pst** file

13.5.1 Exporting Mailbox content to a .pst file

With Outlook open, select the File tab in the upper left, then the Options link in the Outlook Options window that appears, select the Advanced link on the left then the Export button to the lower right.

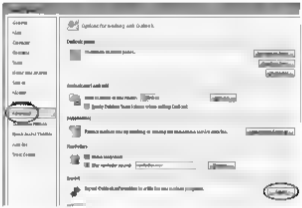

Figure 13.48 –Export

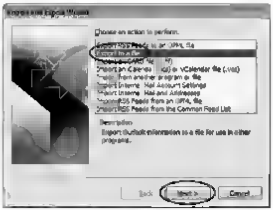

Figure 13.49 –Export

In the Import and Export Wizard dialog box, select Export to a file, then select Next.

In the Export to a File dialog box, select Outlook Data File (.pst) then Next.

In the Export Outlook Data File dialog box select the desired heading (usually your full name) then select Include sub folders to include all folders for the account. Select the Next button

At the top of the Export Outlook Data File window in the Save exported file as field, Outlook names the file backup.pst" by default and displays the path for saving the file in your computer's Documents folder in a sub folder called Outlook Files. Select **Finish** to accept these default settings

Figure 13.50 Export

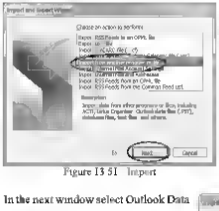

Figure 13.51 Import

13.5.2 Importing Mailbox content from .pst file

Importing a **.pst** file allows you to merge items into one Mailbox/list of folders Steps to Import (merge items) from a **.pst**

With Outlook open select File Open Import in upper left corner From the Import and Export Wizard window select Import from another program or file then Next

In the next window select Outlook Data File (.pst) then Next You may need to use the scroll bar on the right to find this option. In the Import Personal Folders window select Browse and locate your desired pst file then select the Next button.

At the next window make sure that the topmost heading of the Outlook Data File is selected and that the Include Sub folders box is checked to include all

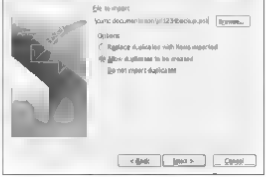

Figure 13.52 Import

items from the .pst file during the import

Leave the default Import location selected, Import items into the same folder in <User Name>.pst to merge email messages, tasks, etc. into the same folders of your current Outlook profile. Select Finish. Outlook imports the email, appointments, tasks, etc. into your current profile

USEFUL TIP

Export and Import is critical for Backup & Restore process in case of any issue with PC or network

QUICK REVIEW

- How to export mail box items in Outlook 2010 for Backup
- How to import old Outlook backup mailbox items?

13.6 Printing Items

You can print individual items, such as email messages, contacts or calendar items or larger views such as calendars, address books or content lists of mail folders

The procedure for printing is the same in Mail, Calendar or any other folders in Microsoft Outlook — all printing settings and functions are found in the Backstage view. Click the File tab to open the **Backstage view**.

A print preview view is automatically provided to help you choose the settings and options that you want

Figure 13.53 : Print

- Click an item or folder in Outlook that you want to print
- Click the File tab
- Click Print
- Perform one of the followings
  - ✓ Click Print
  - ✓ Select the styles and options that you want.

Under Settings click the style that you want. A preview is shown in the Preview Pane unless you are printing multiple items. In this case you are prompted to click Preview in the Preview Pane. When you are ready to print, click Print.

To change the font, heading or other settings of the style that you want, under Printer, click Print Options and then on the Print dialog box, under Print style, click Define Styles. In the Define Print Styles dialog box click Edit or double click a style. In the Page Setup dialog box you can update the font, heading or other settings. On the Print dialog box, click Print. If you want to specify individual pages or sets of pages to be printed, under Printer, click Print Options and then on the Print dialog box, under Print range, click the options that you want. Click **Print**.

USEFUL TIP

Printing is integral part of Outlook as it is with all other MS Office tools. You must try various Print Styles and Options during your practical class.

QUICK REVIEW

- How will access Print option in MS Outlook 2010?
- How can you print your Address Book in Outlook 2010?

Multiple Choice Questions

1 Which of the following parts does MS Outlook 2010 To Do Bar consist of?

a. Date Navigator b. Appointments

c. Task List d. Contacts

2 Which of the following actions from the Delete group not only moves all the existing messages but also the future message in the selected Conversations to the Deleted Items folder?

a. Ignore b. Clean Up

c. Delete d. none of the above

3 You can customize the way you see items in Outlook by changing the _____

a. View b. Look

c. Appearance d. Interface

4 How do you repair a MS Outlook 2010 .pst file if it gets damaged?

a. By using latest backup pst file

b. By scanning the .pst file with scanpst

c. By re logging into the email account

d. The file cannot be repaired

5 Which of the following parameters is used to group email messages as Conversation in MS outlook 2010?

a. Subject b. Cc

c. Sender d. date

6 Outlook To Do list includes Tasks &

a. Calendar Items

b. Journal Entries

c. Notes

d. Flagged Emails for action

7 Which pane displays the content of an item selected in Outlook

a. People b. Folder

c. Navigation d. Reading

8 Which pane displays content associated with the sender of a selected email message?

a. People b. Folder

c. Navigation d. Reading

9 Which type of email account is typically used in business settings?

a. Microsoft Exchange

b. POP3

c. IMAP

d. HTTP

10 Which type of personal email account is typically used to download emails to your computer?

a. Microsoft Exchange

b. POP3

c. IMAP

d. HTTP